92N0099XPE
c.2

ACGR-1

User Guide for Relationship to Person 1 Coding

Automated Coding

Statistics Canada Statistique Canada

Canada

STATISTICS CANADA STATISTIQUE CANADA
SEP 10 1996
LIBRARY
BIBLIOTHÈQUE

User Guide
for Relationship to Person 1 Coding

Prepared by : Census Operations Division
Social, Institutions and
Labour Statistics Field

Table of Contents

1. Introduction 1

1.1 Who should read this User Guide 1
1.2 Examples used 1
1.3 Other reference documents 1

2. To Start Coding 3

2.1 Before you start 3
2.2 The census questionnaire 4

3. Components of the Coding Screen 5

3.1 Coding screen for a general coder 5
3.2 Document information 6
3.3 Persons in the household 8
3.4 Code and Code Status 10
3.5 Action Buttons 11

4. Code a Response 13

4.1 Type a Code in the Code Field 13
4.1.1 Copy Code Function 14
4.2 Select a Code from the Code List 15
4.3 Search a Code in the Reference File 16
4.3.1 Lists and Data Entry Fields 16
4.3.2 Do Closest Match 19
4.3.3 Manual Search for Closest Match 20
4.3.4 Code from Search Window 21
4.4 Copy Code to Uncoded Responses Within a Household 22
4.4.1 Select Source of the Copy 23
4.4.2 Select Target of Copy 24
4.4.3 Code from Copy Code Window 26
4.5 Recoding Within a Household 27

5. Refer a Response 29

Table of Contents, Continued

6. Save and Apply Edits 31

7. View Errors 33

8. Edit 35

9. Browse Additional Information 37

9.1 Browse 37
9.2 Household 39
9.3 Detail 40
9.4 Language 41

10. Screen Keys: Previous/Next/Continue 43

11. System: Quit 45

11.1 Warning Window 45

12. Additional Functions for Expert Coders 47

12.1 Coding Screen for an Expert Coder 48
12.2 Recoding a Batch Code 49
12.3 Uncodeable 49
12.4 Copy Code Function 50
12.5 Referral Question 51
12.6 No Limit on Edit Failures 51
12.7 Warning Window 52
12.8 Expert Utilities: Defer 53
12.9 Report: HOP Report 53
12.10 Expert Utilities: Select Deferral 55
12.11 Expert Utilities: History 56

Table of Contents, Concluded

13. Basic Operations in Windows 57

13.1 Mouse Operations Terminology 57
13.2 Window Operations 57
13.3 To Scroll a List 58
13.4 To Change the Display Width of a Field 59
13.5 To Change Display Order of Fields 59

1. Introduction

1.1 Who should read this User Guide

This User Guide is designed for use by general and expert coders of the Relationship to Person 1 (R2P1) variable. These coders are also referred to as Tier 1 and Tier 2 coders. This document describes the mechanics of the user interfaces and explains the features of the Interactive Coding System.

A basic knowledge of Windows is required to use the Relationship to Person 1 Interactive Coding System. If you are a new Windows user, it is recommended that you read Section 13, **Basic Operations in Windows**, page 57.

1.2 Examples used

In this User Guide, examples are used for illustrative purposes only. With the production system, you may obtain different results given the same respondent data to code.

1.3 Other reference documents

The following document addresses other aspects of coding Relationship to Person 1 responses:

- R2P1 Coding Manual

2. To Start Coding

2.1 Before you start

In order to access the Relationship to Person 1 Interactive Coding System, the following conditions must be satisfied:

- you must have access to a workstation properly set up for Relationship to Person 1 coding;
- you must have received your coder ID and your password from the System Administrator; and
- you must have notified the System Administrator of your language preference. The interface is available in both official languages: French or English.

Responses you will be asked to code will be in the language the respondent has used to reply to the census questionnaire.

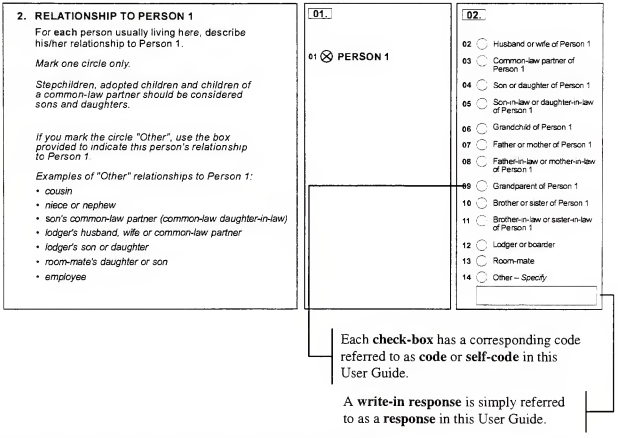
You will be taught how to start the Relationship to Person 1 Interactive Coding System during training.

2.2 The census questionnaire

A census questionnaire collects responses for up to six (6) persons per document. A household could have more than one document when persons are recorded on more than one questionnaire.

A respondent indicates his/her relationship to the person in the household identified as Person 1 by marking a check-box corresponding to a specific relationship or by specifying any other relationship by a write-in response.

The following is an example of the Relationship to Person 1 question from a census questionnaire.

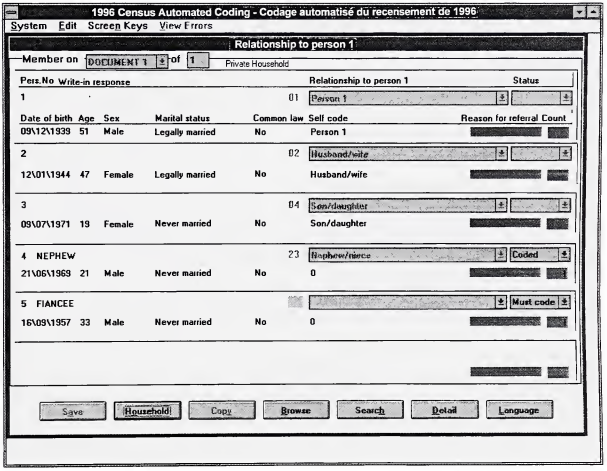


You will use the Interactive Coding System for Relationship to Person 1 to assign a code to each response reported by persons within a household on one or more documents.

3. Components of the Coding Screen

3.1 Coding screen for a general coder

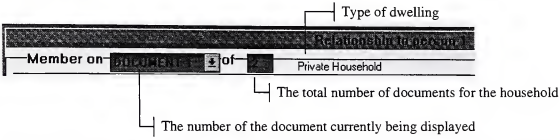
When you start a Relationship to Person 1 coding session, the coding screen is displayed with the data from the first document with one or more responses to be coded.



The components of the coding screen and coding functions used when you are registered as a general coder are described in this section and in Sections 4 to 11 which follow. The coding screen used when you are registered as an expert coder is similar. Additional coding functions for expert coders are described in Section 12.

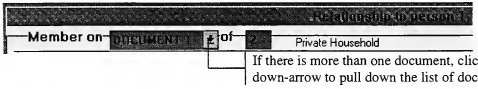
3.2 Document information

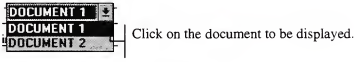
The top row of the Relationship to Person 1 coding screen displays information about the household currently displayed.



The type of dwelling indicates whether a household is a private dwelling or a collective dwelling. For collective households, the display identifies the type of collective such as Hutterite colonies. This information is important because you could be instructed to follow different procedures depending on the type of dwelling you are coding.

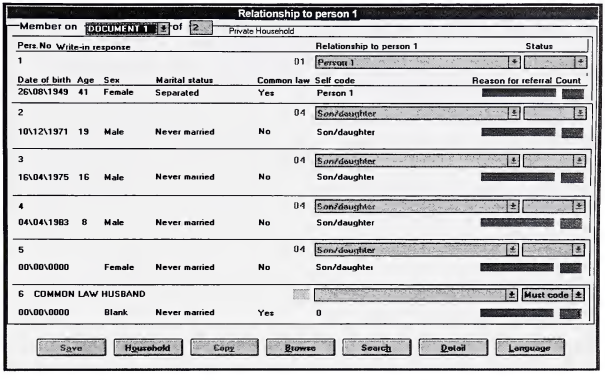
Whenever there is more than one document for the household, the other documents may be displayed by selecting them from the pull-down list.

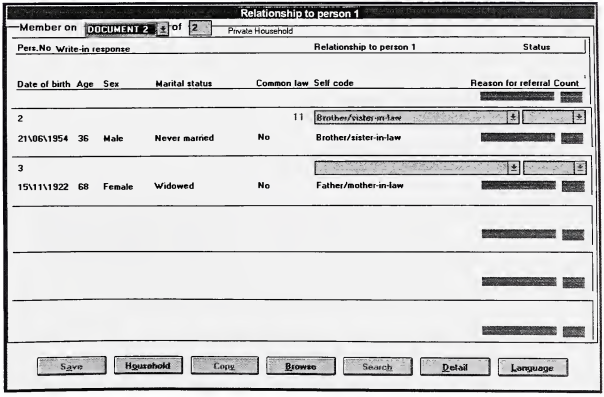




The top row now indicates that document 2 is currently being displayed.

These are examples of document screens for a household.

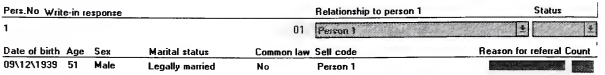




3.3 Persons in the household

The main coding screen displays a document that lists the responses of up to six (6) persons.

The data is displayed on two (2) lines for each person. Field headers are displayed only for the first person reported on each document. The same type of data is displayed for each of the other persons in the household.



The following are the fields from the coding screen which can only be browsed (read mode). These fields **cannot be modified**.

Line 1 (from left to right)

Pers. No. The number of each person in the document.

Response The response to be coded as written by the respondent to specify his/her Relationship to Person 1.

Line 2 (from left to right)

Date of birth Day, month and year of birth as captured.
Format: dd\mm\yyyy

Age Age as calculated by Head Office Processing.
The age field is blank when age could not be calculated.

Sex Sex as captured. The possible values are:

- Male
- Female
- Blank (neither check-box is marked)
- Invalid (both check-boxes are marked)

Marital status Marital status description when a single check-box is marked; or a list of codes (1,2,3,4,5) when more then one check-box is marked.

To display the corresponding description of the codes, double-click on the list of codes (e.g. 3,5).

The possible descriptions and the corresponding codes are:

- Legally married 1
- Separated 3
- Divorced 2
- Widowed 4
- Never married 5

- Blank (no check-box is marked)
- Invalid (both check-boxes are marked)

Common law

Common-law status as captured. The possible values are:

- Yes
- No
- Blank (neither check-box is marked)
- Invalid (both check-boxes are marked)

Self code

Relationship to Person 1 description when a single check-box is marked; or a list of codes (1,2,3,4,5,6,7,8,9,10,11,12,13) where more than one check-box is marked.

To display the corresponding description of the codes, double-click on the list of codes (e.g. 2,3,9).

The possible descriptions and the corresponding codes are:

• Person 1	1
• Husband or wife	2
• Common-law partner	3
• Son or daughter	4
• Son-in-law or daughter-in-law	5
• Grandchild	6
• Father or mother	7
• Father-in-law or mother-in-law	8
• Grandparent	9
• Brother or sister	10
• Brother-in-law or sister-in-law	11
• Lodger or boarder	12
• Room-mate	13
• Other – – specify	14
• (no check-box is marked)	0

Reason for referral

Description of the reason for referral supplied by the general coder to an expert coder for resolution. This field is blank when the household is in general coding.

The possible values are:

- B. Match Fail
- B. Edit Fail
- I. Edit Fail
- I. Choice
- I. SM Attention
- B. SM Attention

During training, you will learn how to interpret the above reasons for referral.

Count

Number of times an identical response occurs in this household.

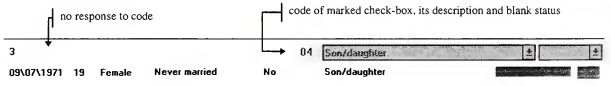
3.4 Code and Code Status

The following are the fields from the coding screen which you may or may not be able to modify, depending on specific conditions. These fields report **the code, its description and its status.**

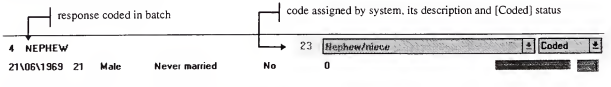
Line 1 (on the right side of the screen)

Code (no header)	Code corresponding to a marked check-box or assigned to a response by the Batch Coding System or by a coder.
Relationship	Standard description of the code assigned to a response or for a marked check-box.
Status	Code status as derived by the system or as set by a coder. The possible values are: • Blank: Derived by the system when a person has no response. • Coded: Derived by the system when a person has a response and the code field is not blank. • Must code: Derived by the system when a person has a response, the code field is blank, and [Referred] or [Uncodeable] status has not been set. • Referred: Status which can be set interactively by a general coder when a person has a response which is difficult to code. • Uncodeable: Status which can be set interactively by an expert coder when a person has a response which is impossible to code.

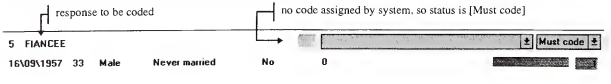
When a person has no response to be coded, the code and status fields can only be browsed.



When a person has a response which the Batch Coding System was able to code, a general coder cannot modify the code field. However, the status field may be set to [Referred] by a general coder. These restrictions do not apply to an expert coder who may modify both the Code and Status fields when a response is batch-coded.



When a person has a response which the Batch Coding System was not able to code, the response must be coded. Both the code and status fields can be modified by general and expert coders.



3.5 Action Buttons

A group of seven (7) buttons is displayed horizontally at the bottom of the coding screen.

Each button contains a brief description of the action you can execute.

During a coding session, each button toggles from a highlighted to a dimmed appearance. A dimmed button identifies an action which is not functional and cannot be selected.

Each button has a special character called a hot key. The hot key is the underlined character in the description associated with the button. To select an action, you may click on the button using the mouse or enter its associated hot key character using the keyboard.

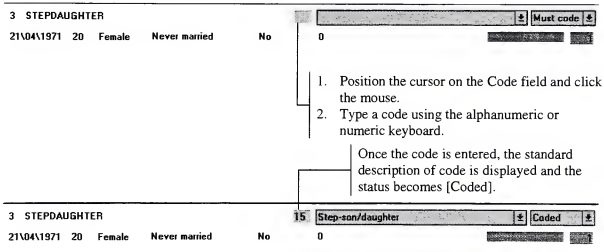
4. Code a Response

The Relationship to Person 1 Interactive Coding System offers a number of coding strategies to assign the appropriate code to each response. The different coding strategies available to a general coder are illustrated with the following examples. These are:

1. to type a code in the Code field;
2. to select a code from the code list;
3. to search and select the closest match for a response in the reference file; and
4. to copy the code from an already coded response to uncoded responses.

4.1 Type a Code in the Code Field

From the Relationship to Person 1 coding screen:



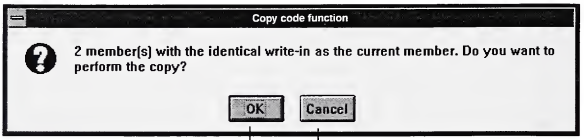
If the code is invalid, a message is displayed in the top right-hand corner of the screen.

If the Code field is erased or deleted, the standard description field is set to blank and the status becomes [Must code].

4.1.1 Copy Code Function

As a general coder, when there is more than one person within a private household or Hutterite colony with a response identical to the one being coded, the system displays a [Copy code] function. The [Copy code] function is a dialog requesting whether the code is to be copied to all persons in the household with an identical response or only to the current member being coded.

For private households or collective Hutterite colonies



Click [OK] to perform the copy and assign the code to all members with an identical response.

Click [Cancel] to cancel the copy and assign the code to the response of the current member only.

For any other type of collective households (not Hutterite colonies)

The [Copy code] function is not displayed and the code is automatically copied to all members in the household which have an identical response.

The [Copy code] function applies as described whether you type a code (page 13), select a code from a code list (page 15) or from a reference file (page 16).

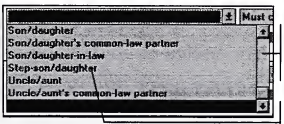
For expert coders, the [Copy code] function is always displayed when there is more than one person with a response identical to the one being coded in a private or any type of collective household.

Note: When the [Copy code] function is executed, it is important to note that the code is copied to all members in the household which have an identical response and these may have already been coded or referred.

4.2 Select a Code from the Code List

From the Relationship to Person 1 coding screen:

Click on the down arrow to pull down the scrollable list of code descriptions for Relationship to Person 1.

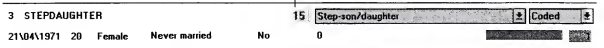


Search for the appropriate code description by scrolling up and down the list using the vertical scroll bar.

Select the appropriate code description by clicking on it.

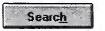
To learn how to scroll, see Section 13.3, **To Scroll a List**, page 58.

Once a selection is made, the code and standard description are re-displayed and the status becomes [Coded].



If a blank description is selected from the list, the code and standard description are both initialized to blanks and the status is set back to [Must code]. The blank description can be found at the bottom of the scrollable list of code descriptions.

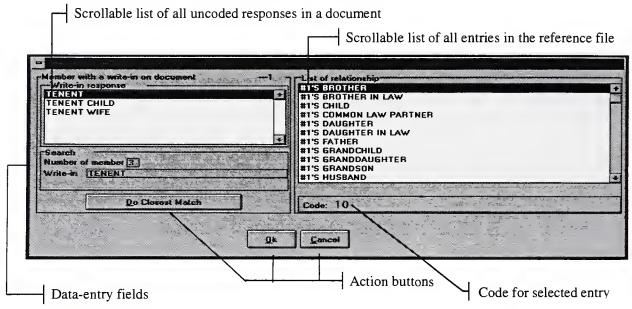
4.3 Search a Code in the Reference File



The [Search] button opens a window to search for the closest matching record in the reference file for a member with an uncoded response in a document.

The [Search] button is functional when at least one member has a response which is not yet coded or which has been referred in a document.

When the [Search] button is pressed, the following Search window is displayed:



The Search window has four components:

1. A scrollable list of all uncoded responses in the document and the document number;
2. A scrollable list of all entries in the reference file and the code for the selected entry in the list;
3. Two (2) data-entry fields: [Number of member] and [Write-in]; and
4. Three (3) action buttons: [Do Closest Match], [OK] and [Cancel].

4.3.1 Lists and Data Entry Fields

Scrollable List of All Uncoded Responses in a Document

The response to be coded must be selected from a scrollable list of uncoded responses in a document. By default, upon opening the Search window, the first entry in the list is highlighted and selected as the response to be coded.

The list reports all uncoded responses in the current document on the Relationship to Person 1 coding screen and identified on the Search window as follows:

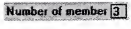
Note: If a household has more than one document, and you wish to list uncoded responses from a different document in the Search window, you must return to the Relationship to Person 1 coding screen to display a different document and re-enter the Search window using the [Search] button.

Scrollable List of All Entries in the Reference File

The potential match for an uncoded response must be selected from a scrollable list of reference file records. Upon entry, by default, the first entry in the list is selected and highlighted as a potential reference file record and code to assign to an uncoded response.

Data-entry fields

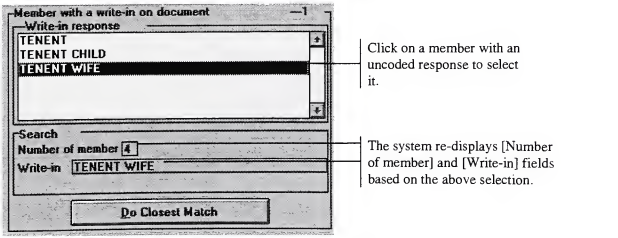
The [Write-in] field is used to specify the response to search for in the reference file. Upon entry, the search string defaults to the response of the first member in the list of uncoded responses.



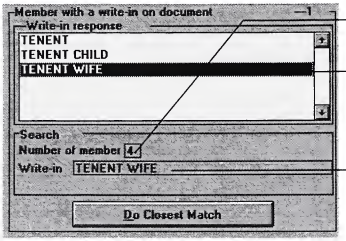
The [Number of member] field identifies the position number in the document of the member to be coded. Upon entry, [Number of member] defaults to the position number of the first member in the list of uncoded responses.

There are two (2) ways to modify the [Number of member] and [Write-in] data-entry fields.

1. Select a different response in the list of uncoded responses. Whenever a new response is selected, the [Number of member] and [Write-in] fields are re-displayed based on the new selection.



2. Enter the position number of a member with an uncoded response in the [Number of member] data-entry field. Whenever the [Number of member] is edited, the response of the person with the position specified is highlighted in the list of responses, and the [Write-in] field is re-displayed.

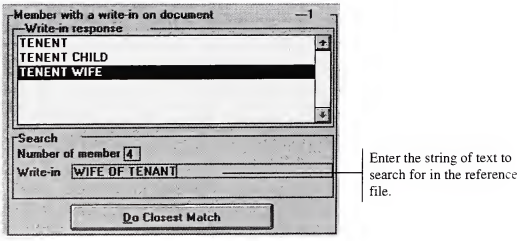


If the [Number of member] entered is invalid, a message is displayed in the top right-hand corner of the screen.

This member is not in the list of members with a write-in.

There is a third way to modify the [Write-in] data-entry field without modifying the [Number of member] field or the current selection in the list of uncoded responses.

3. Enter a new string to search for in the [Write-in] data-entry field. This option is useful to search for a spelling variation of a response being coded.



4.3.2 Do Closest Match

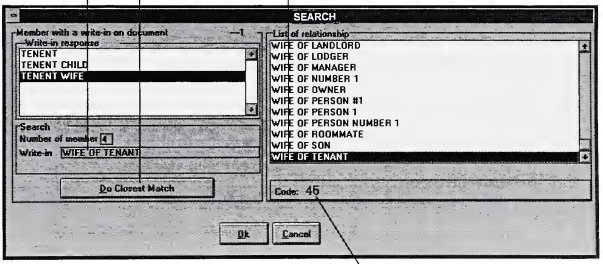
The [Do Closest Match] button executes a search for the [Write-in] field in the reference file.

The [Do Closest Match] button executes a search of the reference file for the closest matching record to the text specified in the [Write-in] data-entry field. In order to find the appropriate reference record for an uncoded response, you may have to repeat a number of searches on the [Write-in] data-entry field by typing spelling variations of the response being coded.

The [Write-in] field specifies the string of text to search for. Edit it or use the system default.

Click on the [Do Closest Match] button to execute the search.

When the search is complete, the closest matching record in the reference file is highlighted and its associated code is displayed below the list.



Code of closest matching record

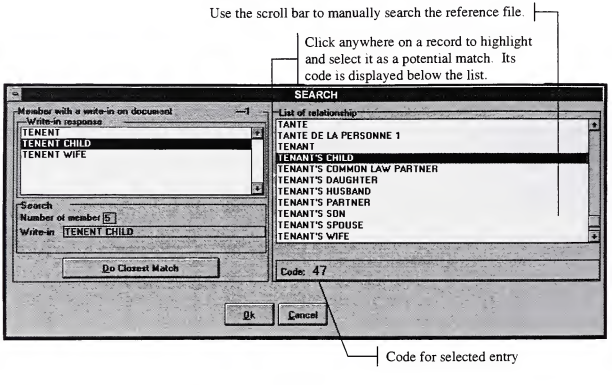
When the [Do Closest Match] button is pressed, the list of reference file entries is automatically scrolled to the closest matching record to the string being searched. The closest matching record is highlighted as a potential match for coding, and its code is displayed below the list.

No response is automatically considered coded when the [Do Closest Match] button is pressed.

4.3.3 Manual Search for Closest Match

In order to find the appropriate reference record for an uncoded response, you may choose to manually scroll up and down the reference file window using the horizontal scroll bar on the right-hand side of the window. To learn how to scroll, see section 13.3, **To Scroll a List**, page 58.

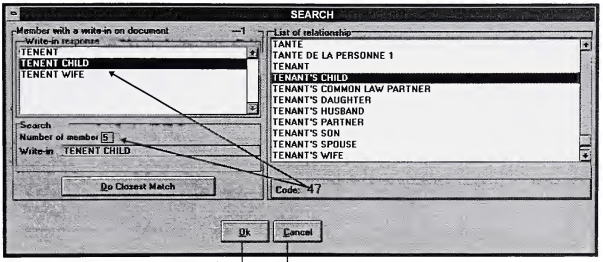
When found, click anywhere on the reference file record to select it as the appropriate match for an uncoded response. The selected record becomes highlighted and its associated code is displayed below the list.



No response is automatically considered coded when a reference file record is selected.

4.3.4 Code from Search Window

Once the appropriate match for an uncoded response has been found, you are ready to code from the Search window. The [OK] button assigns the code selected from the list of reference file records (on the right) to the member in the document whose position is specified by the [Number of member] field and selected from the list of uncoded responses (on the left).



Click on the [OK] button to code the response, close the Search window and return to the main coding screen.

Click on the [Cancel] button to close the Search window and return to the main coding screen without coding.

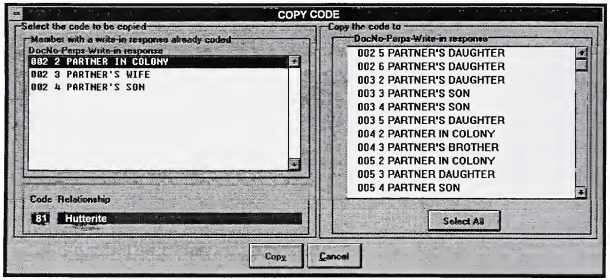
When the [OK] button is pressed, the response is considered coded and its code status is automatically updated to [Coded] on the main coding screen.

4.4 Copy Code to Uncoded Responses Within a Household

The [Copy] button opens the Copy code window where the code of a member with a response already coded can be copied to other members in the household with uncoded responses.

The [Copy] button is functional when at least one member with a response has been coded by a coder, and at least one member with a response is not yet coded or has been referred.

When the [Copy] button is pressed, the Copy code window is displayed:



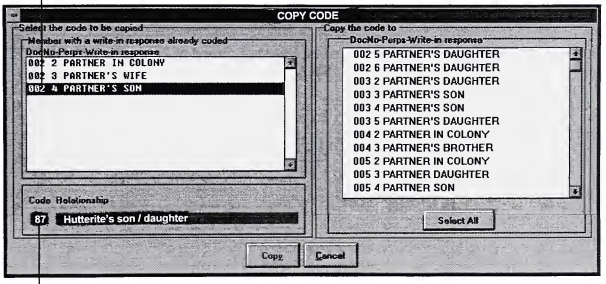
The Copy code window has four components:

1. A scrollable list of all coded responses in the household with document and position information;
2. The code and description of the selected entry in the list of coded responses;
3. A scrollable list of all uncoded responses in the household with document and position information; and
4. Three (3) action buttons: [Select All or None], [Copy] and [Cancel].

4.4.1 Select Source of the Copy

The source of the copy operation must be selected from a scrollable list of coded responses in the household. Upon opening the Copy code window, the first entry in the list is selected as the default source for a copy operation. A coded response is highlighted when it is selected as the source of the copy.

Click anywhere on a row to select a coded response as the source of the copy.

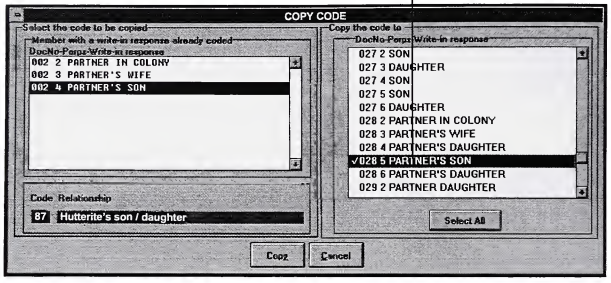


When a coded response is selected, its code and description are displayed below the list.

4.4.2 Select Target of Copy

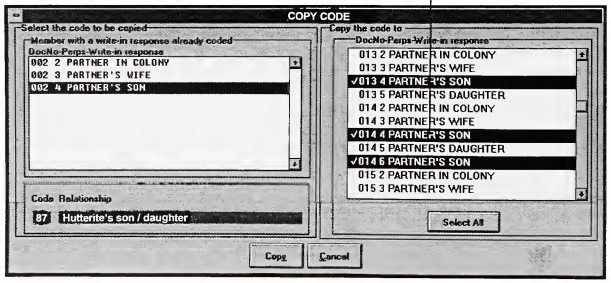
The target of the copy operation must be selected from a scrollable list of uncoded responses in the household. Upon opening the Copy code window, no entry is selected as a default target for a copy operation. Each uncoded response is highlighted and marked when it is selected as the target of the copy.

Click anywhere on a row to select a single uncoded response as the target of the copy.



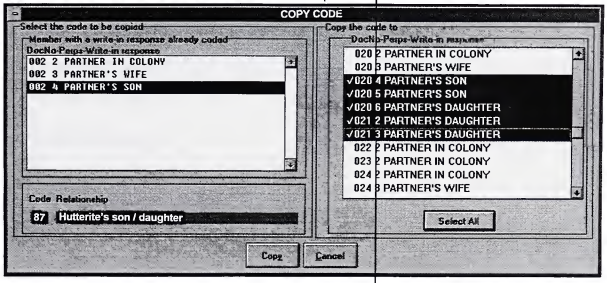
To select multiple uncoded responses as target of the copy:

Hold the [Ctrl] key while clicking with the mouse on each additional uncoded response you wish to select as target of the copy.



To select a range of uncoded responses as target of the copy:

Click on the first row in the range of rows you wish to select as target of the copy.



Hold the [Shift] key while clicking with the mouse on the last row in the range of rows you wish to select as target of the copy.

To select all uncoded responses as target of the copy:

Click on the [Select All] button to select all uncoded responses in the list as target of the copy. The [Select All] button is functional when at least one row in the list is not selected and highlighted.

To select none of the uncoded responses as target of the copy:

When all uncoded responses in the list are selected as target of the copy, click on the [Select None] button to deselect them all. The [Select None] button is functional when all rows in the list are selected and highlighted.

To deselect one or more highlighted uncoded responses as target of the copy:

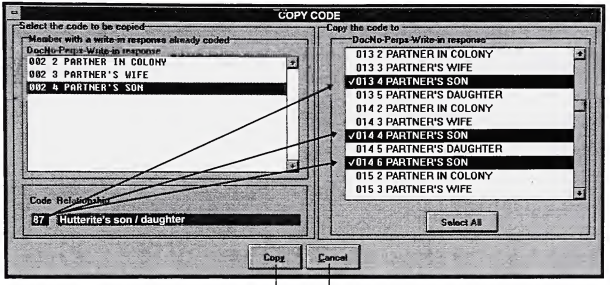
Hold the [Ctrl] key while clicking with the mouse on each highlighted row you do not wish to consider as target of the copy.

To deselect a range of highlighted uncoded responses as target of the copy:

Click anywhere on one of the highlighted rows within the range of rows you do not wish to consider as target of the copy. All but one row will be deselected. To deselect the last row, hold the [Ctrl] key while clicking with the mouse on the last highlighted row in the range.

4.4.3 Code from Copy Code Window

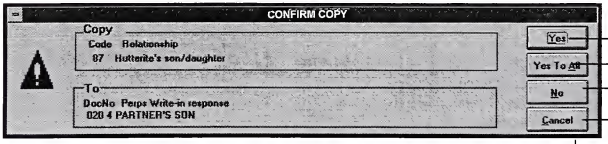
Once the source and target of the copy operation have been selected, you are ready to code from the Copy code window. The [Copy] button assigns the code of the response selected as the source (on the left) to the uncoded responses selected as the target (on the right).



Click on the [Copy] button to copy the code.

Click on the [Cancel] button to close the Copy code window without coding.

When the [Copy] button is pressed, the Confirm Copy dialog is displayed.



Click on the [Cancel] button to exit without copying a code.

Click on the [No] button to skip coding for the response displayed.

Click on the [Yes to All] button to copy the code to all selected responses.

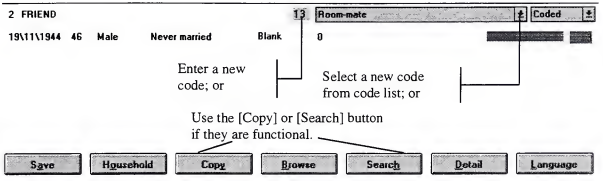
Click on the [Yes] button to copy the code to the displayed response.

Responses where the Copy code operation is confirmed are considered coded. The status of each of these responses is automatically updated to [Coded] on the main coding screen.

4.5 Recoding Within a Household

While attempting to code responses, you may decide to recode a response of the current household which you have coded and now has a status of [Coded]. The coding steps described in Sections 4.1 to 4.4 can be followed when recoding responses within the household.

The only restriction is that a response coded by the Batch Coding System cannot be recoded by a general coder. Only expert coders can recode Batch System coded responses.



Before you can execute the [Search] or [Copy] action buttons to recode a response with a status of [Coded], you must first set its status to [Must code] or [Referred].

- To change the status from [Coded] to [Referred], select the [Referred] status from the pull-down list of the status field.

- To change the status from [Coded] to [Must code], you have three (3) basic techniques:

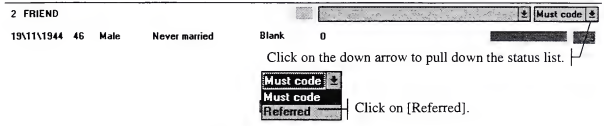
  1. use the [backspace] key to erase the code;
  2. highlight the code and delete it using the [Delete] key; or
  3. select the blank entry at the bottom of the code descriptions pull-down list.

Hint: To recode responses from previously observed households during a given coding session, use the Screen Keys: Previous/Next/Continue (see page 43).

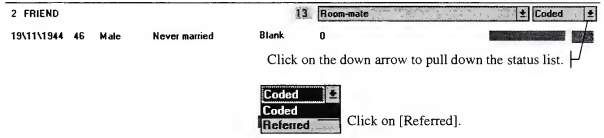
5. Refer a Response

You may decide to refer coding of a response to an expert coder whenever a suitable match cannot be found after a number of search attempts.

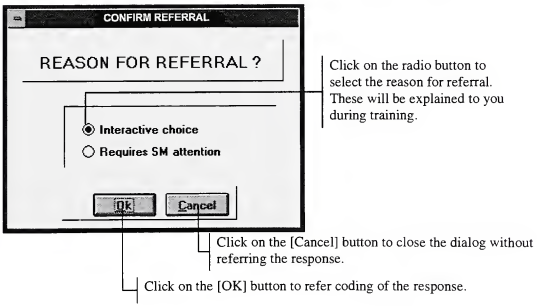
On the main coding screen:



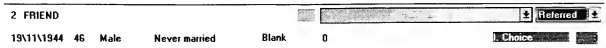
It is also possible to refer coding of a response which has already been coded, whether by the Batch Coding System or by yourself during this coding session.



When you refer coding of a response, the Confirm Referral dialog is displayed.



Once the coding of a response is referred:



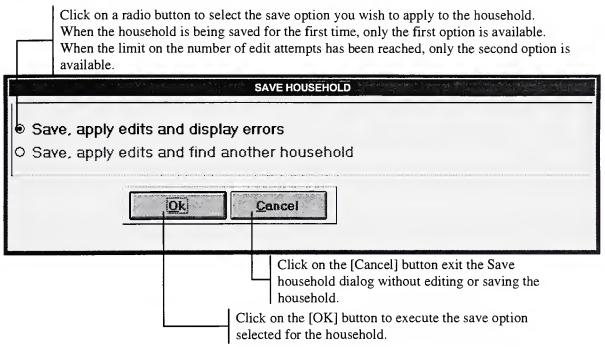
Warning: If there is more than one person in the household with a response identical to the person being referred, the system will **not** display a [Copy code] function requesting the referred status to be copied to all members in the household with an identical response. The referred status is assigned to the current member only.

6. Save and Apply Edits

The [Save] button applies the edits and, depending on the save option selected, saves the code, status flag and error conditions of each member of the household.

Whenever there are no more responses with a status of [Must code], the [Save] button becomes functional and highlighted. A number of Relationship to Person 1 edits are applied to the household members as part of the save function.

When you click on the [Save] button, a Save household dialog is displayed.



When the [OK] button is pressed, the following edits are applied to each person in the household:

- Within-person edits to ensure the code assigned is consistent with age, marital and common-law status of the person.
- If collective dwelling, checks the collective dwelling type of the household.
- Between-persons edits to ensure the sex and age of the coded person is compatible with the sex and age of Person 1.
- Household edits to ensure the code assigned is compatible with the codes of other members of the household.

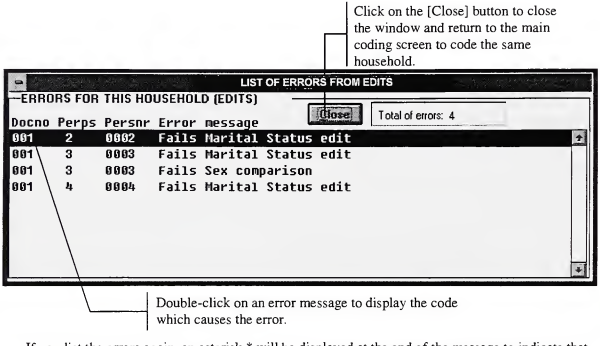
When there are no edit failures:

The code and status flags of all members coded in the household are saved and the system looks for the next household to be coded.

When there are one or more edit failures:

- If the option selected is [Save, apply edits and find another household], the household is saved along with the error conditions raised and the code and status flags of each member in the household. The status of members with edit failures will be set to [Referred] by the system. The system returns to the main coding screen and looks for the next household to be coded.

- If the option selected is [Save, apply edits and display errors], a scrollable list of errors from edits is displayed for the household.



If you list the errors again, an asterisk * will be displayed at the end of the message to indicate that the code causing this error has already been looked at.

For general coders only:

The limit on the number of attempts to edit a given household has been set to five (5). When this limit has been reached for a given household, the system prevents you from selecting the [Save, apply edits and display errors] option. The only option available is [Save, apply edits and find another household], by which the status of responses with edit failures is set to [Referred] by the system.

7. View Errors

The [View Errors] option on the menu bar displays the list of errors from the last edits applied to members of the current household, if there are any.

For examples, see Section 6, **Save and Apply Edits**, page 31.

8. Edit

The [Edit] option on the menu bar can be used to edit text using Windows Cut and Paste functions. This option does **not** apply to Relationship to Person 1 edits to validate the codes and person data within a household. This is done when the household is saved using the [Save] button.

9. Browse Additional Information

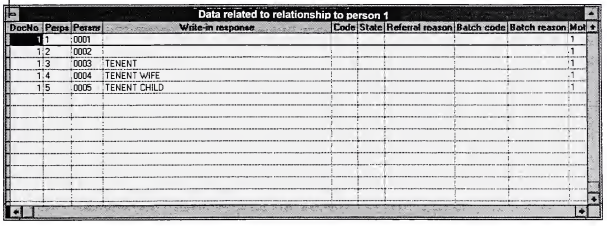
9.1 Browse

The [Browse] button displays the data available for each member in the document in the format of a browse window.

The browse window is a scrollable list displaying members in a document where at least one member requires coding. Each row represents one member in the document. Each column corresponds to a particular characteristic of the respondent record.

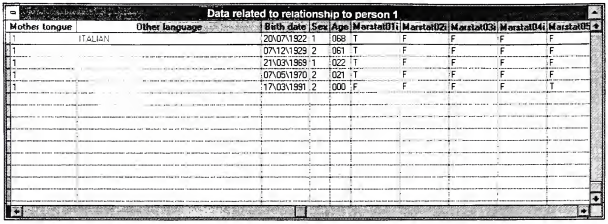
The data reported in the browse window is the same in content as data displayed on the Relationship to Person 1 coding screen.

Click on this button to close the browse window and return to the coding screen.



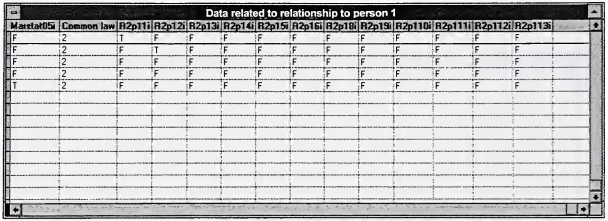
Each window displays only a segment of the respondent record at time. You can use the scroll bars which appear along the right and bottom edges of the window to scroll through the list. To learn how to scroll, see Section 13.3, **To Scroll a List**, page 58.

The two (2) screens which follow illustrate the same records when scrolled to the right.



Data related to relationship to person 1

Mother tongue	Other language	Birth date	Sex	Age	Marstat01i	Marstat02i	Marstat03i	Marstat04i	Marstat05
1	ITALIAN	20\07\1922	1	068	T	F	F	F	F
1		07\12\1929	2	061	T	F	F	F	F
1		21\03\1969	1	022	T	F	F	F	F
1		07\05\1970	2	021	T	F	F	F	F
1		17\03\1991	2	000	F	F	F	F	T



Data related to relationship to person 1

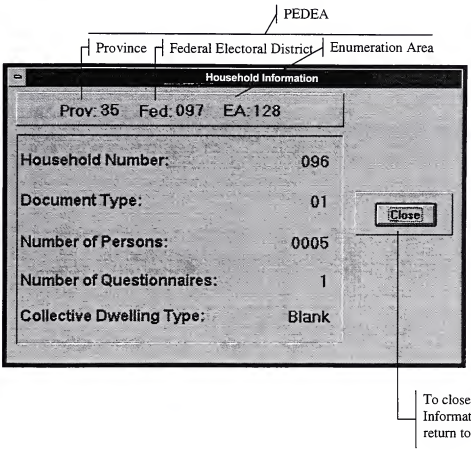
Marstat05i	Common law	R2p11i	R2p12i	R2p13i	R2p14i	R2p15i	R2p16i	R2p18i	R2p19i	R2p110i	R2p111i	R2p112i	R2p113i
F	2	T	F	F	F	F	F	F	F	F	F	F	F
F	2	F	T	F	F	F	F	F	F	F	F	F	F
F	2	F	F	F	F	F	F	F	F	F	F	F	F
F	2	F	F	F	F	F	F	F	F	F	F	F	F
T	2	F	F	F	F	F	F	F	F	F	F	F	F

Each field has a header and can be moved or resized. To learn how to move and resize a field in a window, see Section 13.4, **To Change the Display Width of a Field**; and Section 13.5, **To Change Display Order of Fields**, page 59.

9.2 Household

The [Household] button opens the Household Information window.

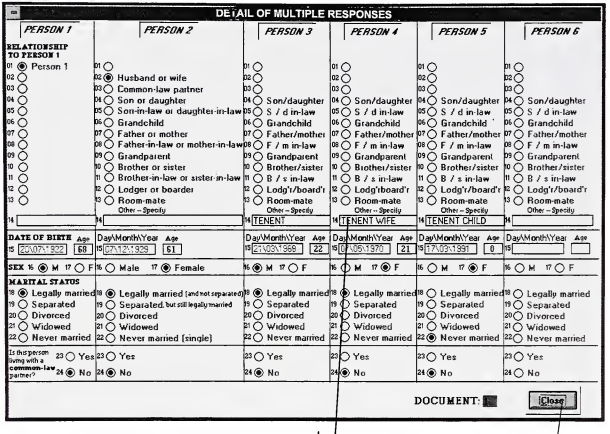
The Household Information window displays the identification and other attributes of the household such as: document type, number of persons, number of questionnaires and collective dwelling type. This information can be browsed, but not modified.



9.3 Detail

The [Detail] button opens the Detail of Multiple Responses window.

The Detail of Multiple Responses window displays responses to the Relationship to Person 1 question as well as demographic characteristics date of birth, age, sex, marital status and common-law status. Responses are displayed for each member in the document in a format similar to the one used for these questions on the census form. This information can be browsed, but not modified.



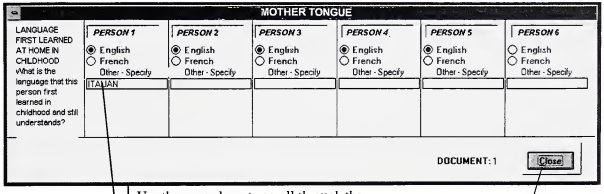
Use the arrow keys to scroll through the text of the write-in response field.

To close the Detail window and return to the coding screen.

9.4 Language

The [Language] button opens the Mother Tongue window.

Responses to the Mother Tongue question are displayed for each member in the document in a format similar to the one used for these questions on the census form. This information can be browsed, but not modified.

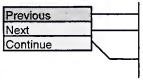


Use the arrow keys to scroll through the text of the response field.

To close the Mother Tongue window and return to the coding screen.

10. Screen Keys: Previous/Next/Continue

Under the [Screen Keys] item on the main menu bar, three (3) options are available:



[Previous] goes back to a previously observed household.
[Next] advances forward to the next previously observed household.
[Continue] skips all previously observed households and returns to the first household not yet coded in order to continue coding.

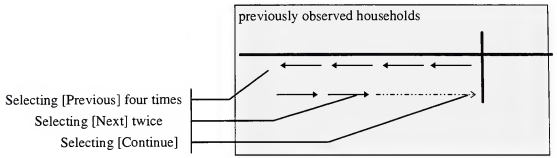
While coding responses, you may decide to review a previously observed household. The system allows you to go back up to four (4) previously observed households.

Each time the [Previous] button is pressed, the system goes back one previously observed household. The [Previous] button is functional only after at least one household has been processed.

Each time the [Next] button is pressed, the system advances one previously observed household until you are positioned at the first uncoded household. The [Next] button is functional only after the [Previous] button has been selected

The [Previous] and [Next] buttons display a previously observed household as if it had never been processed. By looking at the screen, you cannot tell how the response had been previously resolved.

You may use the [Continue] button to return to the first uncoded household, and to continue coding. Each previously observed household skipped keeps its previously assigned codes and status unless it has been explicitly recoded and saved.



A warning window may be displayed by the system when leaving a household without saving changes or without correcting edit failures. See Section 11.1, **Warning Window**, page 45.

11. System: Quit

Under the [System] item on the main menu bar, the [Quit] option ends the coding session.

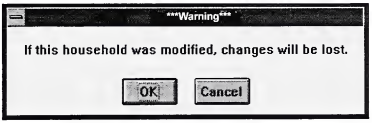
A warning window may be displayed by the system when leaving a household without saving changes or without correcting edit failures. See Section 11.1, **Warning Window,** which follows.

Note: The [Quit] option is disabled when you are coding a previously observed household. Select [Continue] under [Screen Keys] first in order to be able to end the coding session.

11.1 Warning Window

A warning window may be displayed by the system when leaving a household. A general coder leaves a household when the [Quit] option or [Previous/Next/Continue] option is selected from the main menu.

This warning window is displayed when one of the above options is used to leave a household to which changes were made or attempted but not saved.



This window is displayed when the [Quit] option is used to leave a household with edit failures which have been saved but have not been corrected (i.e. using the option to look for the next household).

An expert coder has three (3) additional methods of leaving a household: [Select Deferral], [Defer] and [HOP Report]. A third warning window may be displayed to expert coders under certain conditions.

12. Additional Functions for Expert Coders

The functions available to expert coders include all those available to the general coders.

In addition, the following options are available to expert coders only. Each of these is either a new option or a variation of a function already available to general coders.

Recode a Batch code Ability to modify a code assigned to a response by the Batch Coding System.

Uncodeable Option to set the status of a response to [Uncodeable].

Copy code function Displayed when there is more than one person with a response identical to the one being coded for private or any type of collective households.

Referral question When a response is a referral from general coding, the expert coder is requested to indicate whether this response should have been referred.

No limit on edit failures No limit on the number of times the edits can be applied to a household.

Warning A warning window may be displayed by the system when leaving a household. An expert coder has three (3) additional methods of leaving a household: [Select Deferral], [Defer] or [HOP Report].

Defer Option to defer coding of a household or to refer coding to another expert coder.

HOP report Option to defer coding of a household to later and print a report with notes and questions to be forwarded to Head Office Processing.

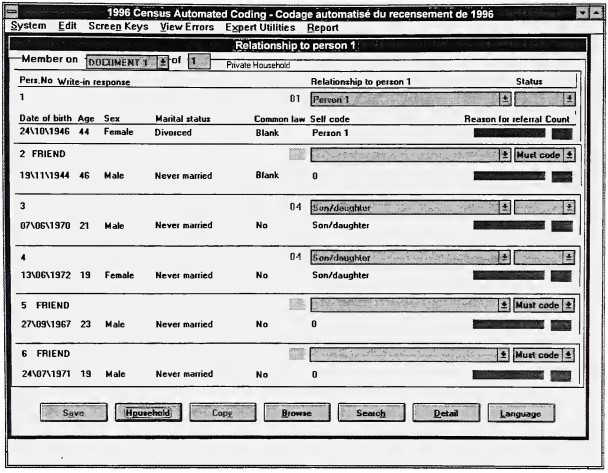
Select deferral Option to select households to be coded that have been deferred by an expert coder.

History Additional browse window available to expert coders to display the coding history of each member of a household.

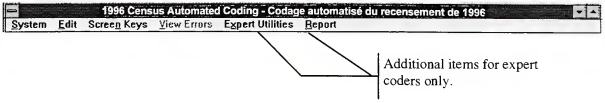
Although there is little difference in the function and mechanics of the Interactive Coding System for general and expert coders, the coding procedures to be followed by each tier of coder are different. Refer to the R2P1 Coding Manual for detailed instructions specific to each tier of coder.

12.1 Coding Screen for an Expert Coder

When an expert coder starts a Relationship to Person 1 coding session, the coding screen is displayed with the data of the first document with one or more persons to be coded. The coding screen is identical to the one used by the general coders, with the exception of the menu bar.



Two (2) additional items are available for expert coders on the menu bar.



Under the [Expert Utilities] menu item from the menu bar, three (3) options are available:

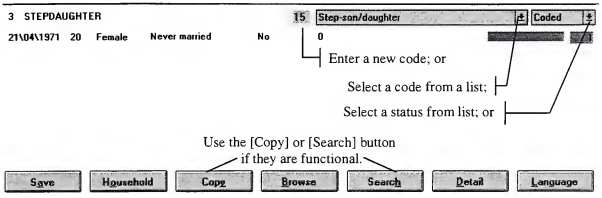
History
Defer
Select Deferral

Under the [Report] menu item from the menu bar, a single option is available:

12.2 Recoding a Batch Code

An expert coder, unlike the general coder, can modify both the code and status fields of a response coded by the Batch Coding System. The procedures described in Section 4 are used to do so.

On the main coding screen:



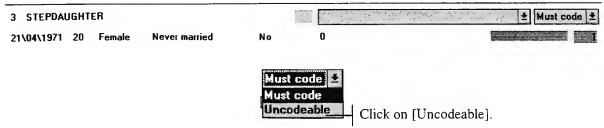
Note: Before you can execute the [Search] or [Copy] action button to recode a response, you must first set its status to [Must code]. To change the status from [Coded] to [Must code], you have three (3) basic techniques:

1. Use the [backspace] key to erase the code; or
2. Highlight the code and delete it using the [Delete] key; or
3. Select the blank entry at the bottom of the pull-down list of code descriptions.

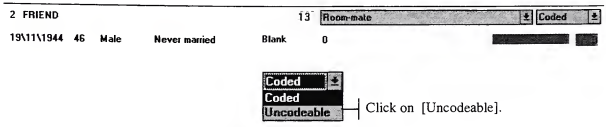
12.3 Uncodeable

An expert coder may decide to set the status of a response to [uncodeable] when a suitable match cannot be found after a number of searches of the reference file.

On the main coding screen:



It is also possible to modify the status of a response which has already been coded by the Batch Coding System or by an expert coder during a coding session from [Coded] to [Uncodeable].

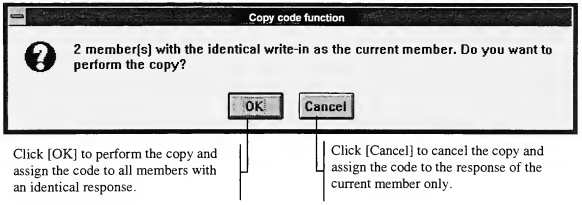


The [Uncodeable] status is available to expert coders only.

12.4 Copy Code Function

The [Copy code] function is a dialog requesting whether the code is to be copied to all persons with an identical response or only to the current member being coded. For expert coders, this dialog is displayed for all types of private or collective households where there is more than one person with the same response.

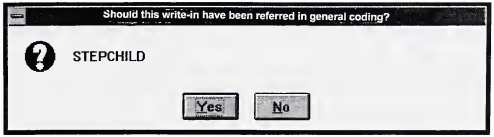
For private and any type of collective households



This option is available to general coders for private households and Collective Hutterite Colonies only.

12.5 Referral Question

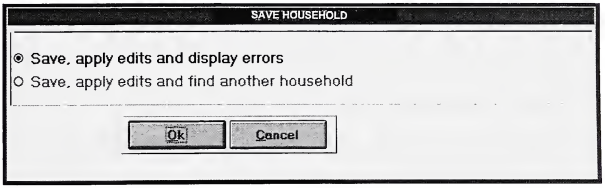
When a response was referred in general coding, a dialog is displayed asking whether the response should have been referred or not.



12.6 No Limit on Edit Failures

The limit on the number of attempts permitted to edit and save a given household applies only to general coders. When the limit has been reached for a given household, the system prevents the general coder from selecting the option to [Save, apply edits and display errors].

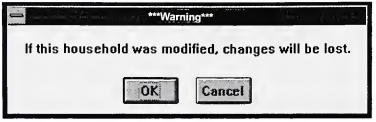
This restriction does not apply to expert coders. When the [Save] button is pressed by an expert coder, both save options are available.



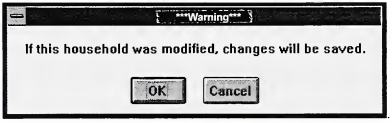
12.7 Warning Window

A warning window may be displayed by the system when exiting a household. An expert coder has five (5) options to exit a household: [Quit], [Previous/Next/Continue], [Select Deferral], [Defer] or [HOP Report].

This warning window is displayed when the [Quit], [Previous/Next/Continue] or [Select Deferral] option is used to exit a household to which changes were made or attempted, but not saved.



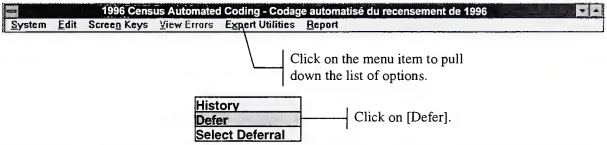
This warning window is displayed when the [Defer] or [HOP Report] option is used to exit a household to which changes were made or attempted, but not saved.



This warning window is displayed when the [Quit] or [Select Deferral] option is used to exit a household with edit failures which have not been corrected but have been saved (i.e. using the option to look for the next household).

12.8 Expert Utilities: Defer

Under the [Expert Utilities] menu item from the menu bar, the [Defer] option defers coding of a household or refers coding to another expert coder.

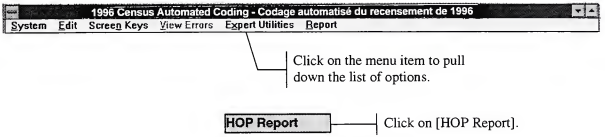


When you select [Defer], coding of all members in the household currently displayed on the Relationship to Person 1 coding screen is automatically deferred and the system searches for the next household to be coded.

The equivalent of the [Defer] option for general coders is to set the status of a response to [Referred]. The [Referred] status is not available to expert coders.

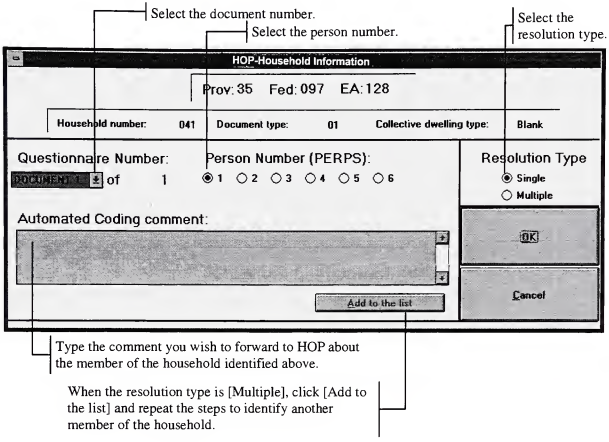
12.9 Report: HOP Report

Under the [Report] menu item from the menu bar, the [HOP Report] option defers coding of a household to later and prints a report with comments and questions to forward to Head Office Processing.



When you select [HOP Report], a HOP Report dialog appears where you must specify any comments to be forwarded to HOP about members of the household. All comments or questions pertaining to members of the same household should be reported on a single HOP report.

To enter comments about more than one member in a household on a single HOP report, set the resolution type to [Multiple]. The system default is [Single].



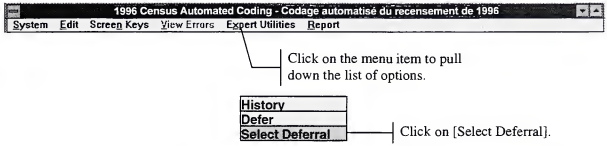
Once comments for all members within a household are entered, you are ready to generate the HOP report for the household.

Click on the [OK] button to generate the HOP report and defer coding of all members in the household currently displayed on the Relationship to Person 1 coding screen. The HOP report dialog window is closed and the system automatically displays the next household to be coded on the main coding screen.

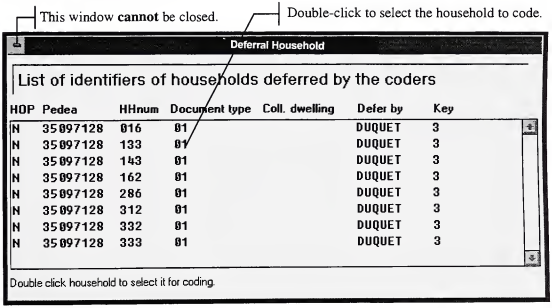
Click on the [Cancel] button to close the HOP report dialog without generating the HOP report or deferring coding of the household. The system returns to the main coding screen.

12.10 Expert Utilities: Select Deferral

Under the [Expert Utilities] menu item from the menu bar, the [Select Deferral] option allows an expert coder to select one household to be coded from a list of deferred households.



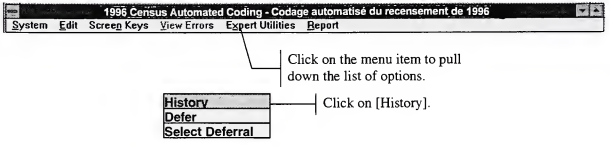
When you select [Select Deferral], a browse window is opened listing all households that have been deferred by expert coders.



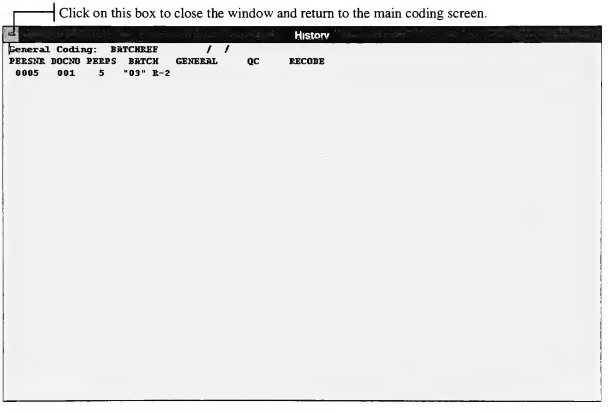
The first column indicates whether a HOP report was generated for the household when it was deferred. A warning window is displayed when the HOP report is required to code a household.

12.11 Expert Utilities: History

Under the [Expert Utilities] menu item from the menu bar, the [History] option opens a browse window giving the coding history of each household members.



An example of the coding history window is shown below.



13. Basic Operations in Windows

13.1 Mouse Operations Terminology

A basic knowledge of Windows is required to use the Interactive Coding System for Relationship to Person 1.

To point	Position the tip of the mouse pointer over the specified element without using the left mouse button
To click	Position the tip of the mouse pointer over the specified element, and then press once and then release it.
To double-click	Position the tip of the mouse pointer over the specified element, then press and release the left mouse button twice in quick succession.
To drag	Position the tip of the mouse pointer over the specified element, hold down the left mouse button, and move the mouse. The mouse pointer moves, dragging the element. Move the element to the desired location and release the left mouse button.

13.2 Window Operations

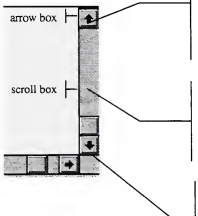
In the Interactive Coding System for Relationship to Person 1, these buttons are functional in some windows only.

To pull-down a list of options	Click on the pull-down button at the right end of the label to pull-down its list of options.
To minimize a window	Click on the minimize button in the upper right corner of the window.
To restore a minimized window	Double-click on the icon representing the minimized window to be restored.
To maximize a window	Click on the maximize button in the upper right corner of the window.
To restore a maximized window	Click on the restore button in the upper right corner of the window.
To move an entire window	Drag the title bar of the window to the desired location.
To select a window	Click anywhere on the window to be activated. The menu bar and borders of the selected window are darkened.
To close an window	Click on the control-menu button in the upper left corner of the window. When you close the window of an application, the corresponding application stops.

13.3 To Scroll a List

A window displays only a segment of a file (or a list) at a time. You can use the scroll bars which appear along the right and bottom edges of the window to scroll through a file (or a list).

The illustration below describes how to use the arrow boxes and the scroll box within the vertical scroll bar to scroll up and down a window. The same steps apply to scroll a window from left to right using the horizontal scroll bar.



To scroll slowly, one line at a time, click once, one of the arrow boxes located at either end of the scroll bar.

To scroll continuously, one line at a time, click one of the arrow boxes and hold down the mouse button.

The list is scrolled in the direction of the arrow box.

To scroll, one screen at a time, click once below or above the scroll box in the scroll bar.

The list is scrolled up when clicking above the scroll box or down when clicking below the scroll box.

To scroll rapidly through the list, click and drag the scroll box up or down in the scroll bar.

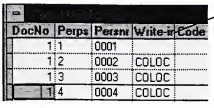
The list is scrolled in the direction that the scroll box is being dragged.

In the Interactive Coding System for Relationship to Person 1, the following screens contain lists which can be scrolled up and down as described above.

- SEARCH screen
- COPY CODE screen
- BROWSE screen of data related to Relationship to Person 1
- DEFERRAL HOUSEHOLD screen
- HISTORICAL screen

13.4 To Change the Display Width of a Field

You can change the display width of a field in the browse window. The actual width of the field in the database is not modified, only its display width. Data seems to disappear or get cut off when resizing. However you cannot damage the underlying data when modifying the display width of a field.

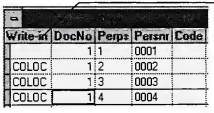


DocNo	Perps	Persnr	Write-in	Code
1	1	0001		
1	2	0002	COLOC	
1	3	0003	COLOC	
1	4	0004	COLOC	

Position the cursor on the vertical line in between field headings.
The cursor darkens and grows arrows on its sides.
Drag the vertical line left or right to widen or narrow the display size of the field.

13.5 To Change Display Order of Fields

You can change the display order of fields in browse window. This does not change the actual order of the fields in the database, only the display order.



Write-in	DocNo	Perps	Persnr	Code
	1	1	0001	
COLOC	1	2	0002	
COLOC	1	3	0003	
COLOC	1	4	0004	

Position the cursor on the heading of the field to be moved.
Drag the field name that you want to move left or right until the column is relocated.
In this example, the Write-in field was moved to become the first column.

In the Interactive Coding System the only window where the above applies is: Browse screen of data related to Relationship to Person 1.

Ca 009

STATISTICS CANADA LIBRARY
BIBLIOTHEQUE STATISTIQUE CANADA
1010220930

#70179

DATE DUE